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Coordinator-Level Functions

Introduction

The Coordinator-level functions are basically background functions: providing PEPbase with the data it needs to generate the Shopping Lists and other forms needed by the Guests at the time of service, and obtaining from PEPbase the information needed to report on the Pantry's service, demographics, and impact.

We presume that generally the Coordinator (or the person designated as Coodinator for the purpose of handling these functions) will be working away from the hurly-burly of the agency's service hours, and that she/he will have more in-depth background in and understanding of the agency's policies and guidelines as well as greater understanding of PEPbase's structure and function.

Because errors made in carrying out Coordinator functions have much more impact on PEPbase's operation, these functions are listed on a separate menu which is available only to "Coordinator" accounts. It is strongly recommended that you have one or more "Host" logins which are used for normal pantry operations, in addition to a separate "Coordinator" login, which has a password known only to the pantry Coordinator. [1]

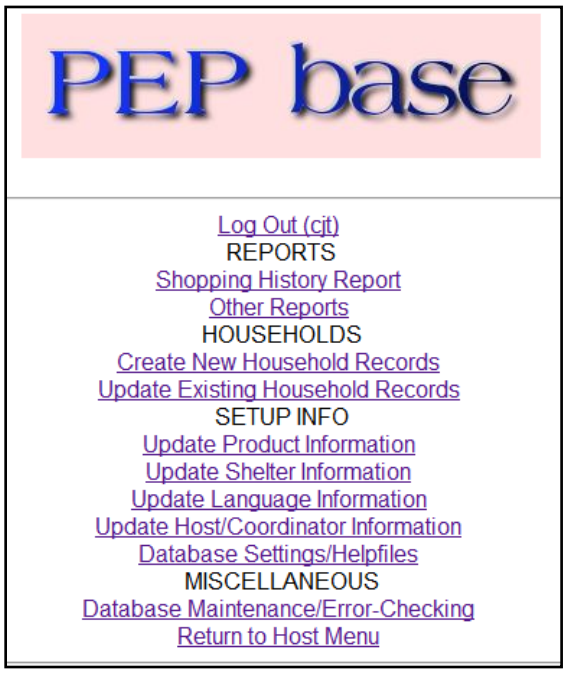
Please note that the *routine* for the log-in is the same for a Host as for the Coordinator:

It's the user log-in identity or user name that determines whether the log-in will take you to the Host menu or the Coordinator menu. If your user name has been defined as a Host, you'll see the Host menu; if, however, your user name has

[1] Right now, user names and passwords are set up as part of the installation process. By mid-summer, this capability will be included in the Coordinator functions. When that functionality is completed, this section of the manual will be changed to include the necessary information.

been defined as a Coordinator, as the user name Christine has been for our Pantry, then you'll see the Coordinator menu.

Once you've logged in, the **Coordinator Functions** screen appears:



As of the time of this printing (May 2009), many functions within this area are still under development. As these are completed, this section of the manual will of course be updated to include them. We will be discussing these functions in their order as shown on this menu, with notations as to functions that are still under development. This is not necessarily the most logical order in terms of the frequency of use of the functions, but these functions don't fall into logical operational order in the same fashion as the Host functions, so menu order seems as appropriate as anything else.

Reports

At the moment, the Shopping History Report is the only report available. Reports for household demographics along a variety of dimensions should be set up by the end of Summer 2009.

Shopping History Report

The Shopping History Report provides summary information on pantry activities for a user-definable time period. The information included in the report can be

presented at two levels of detail: daily (that is, each agency service period within that time period is summarized separately) or monthly (that is, the figures are totaled for each month's visits within the specified time period). For agencies who are only open once a month, these two levels will of course be identical, but for agencies who are open weekly or several times weekly, the amount of data in the final report can vary significantly.

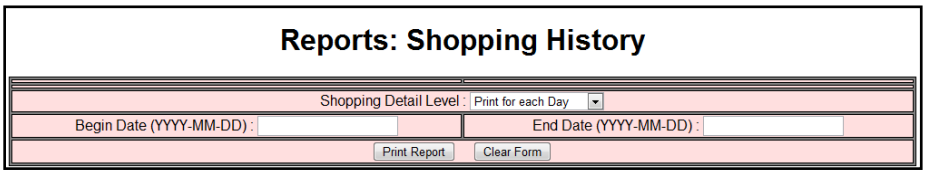
The summary information includes:

- The number of households visiting within the specified time period;
- The number of households eligible for each product within the Products Database (this includes inactive products; see the discussion in *Interpretation of the Shopping History Report*, below);
- The total number of each product that were requested;
- The total number of each product that were provided.

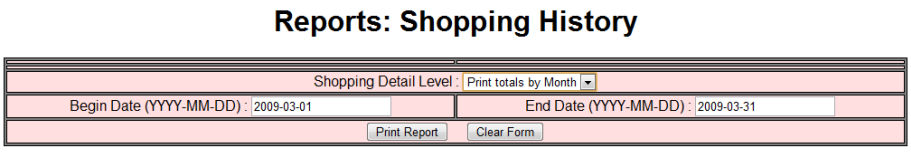
As of the time of this writing (May 2009), the report is generated as a table that is best handled by copying-and-pasting into a spreadsheet program such as Microsoft Excel.

Generating the Shopping History Report

Clicking on the Shopping History Report link brings up a screen letting you specify the time period of interest, and the level of detail desired:



We'll ask for a report for March 2009 (this will be from the Personal Essentials Pantry, since that's the database that has the most data at the moment; the data in the demo version is still pretty sparse). Since the Personal Essentials Pantry is open two days a week, there would be a *lot* of data with the "Print for each Day" level. We'll make it a little more concise with "Print totals by Month:"



Clicking on Print Report brings up the standard Print Dialog Box and the report's table. The number of columns will depend upon the number of events included within the specified time period (in this case, since we asked for just March 2009, and for Print totals by Month, we have only one event); there will always be four columns for each event, plus four columns for the summation for the specified time period. The number of rows in the column will depend on the number of products within your agency's Product Database. For ease in our discussion here, I've truncated this table at just the first eleven products.

Prod-ID	Product-Name	2009-03				Total Counts			
		#HH	Req	Prov	%	#HH	Req	Prov	%
	Total Guest Visits	287				287			
1	toilet paper	230	223	186	83	230	223	186	83
2	kleenex	241	232	47	20	241	232	47	20
3	laundry soap	229	222	172	77	229	222	172	77
4	dish soap	224	217	186	86	224	217	186	86
5	all-purpose cleaner	153	145	132	91	153	145	132	91
6	glass cleaner	123	115	103	90	123	115	103	90
7	scouring cleanser	197	188	21	11	197	188	21	11
8	paper towels	259	250	18	7	259	250	18	7
9	garbage bags	215	208	77	37	215	208	77	37
10	plastic wrap	0	0	0	0	0	0	0	0
61	Incontinence pads	0	0	0	0	0	0	0	0
11	aluminum foil	0	0	0	0	0	0	0	0

The table can be printed as shown, of course, but you will probably want to do a copy-and-paste of the table into a spreadsheet to allow better formatting. We'll say more about what you might want to do with the formatting in *Reformatting and additional calculation possibilities*, below.

Interpretation of the Shopping History Report

The column Product-Name is fairly self-explanatory; this is simply the name of the product as you defined it in the Product Definitions process (see that discussion, beginning on page 12). Prod-ID is similarly straightforward; this is the (unique) identifier number that PEPbase assigns to each product; it's useful (all right, it's essential) to PEPbase's operation, but it's something we humans can pretty ignore.[2] (In fact, I usually just delete it from the spreadsheet file, if I even included it in the area for cutting-and-pasting.)

[2] We'll deal with this again in *Update product information* on page 12 of this section, but it is a singularly bad idea to ever try to delete a product or to make it over into a new product. Even if you're never, ever going to carry it again, remove it from your listings by marking it inactive. The little bit of data space you might save will be more than destroyed by the fact that your statistics will be shot to pieces.

The #HH column is the number of households that were eligible for at least one of every given product for each event within the specified time period (in our example, the "event" of 2009-03, or March 2009), or, in the Total Counts column, the total number of households eligible for each product across all events within the time period. (In this case, of course, we only have one "event," so the Total Counts are the same as the "event" counts.) In no case should any product in this column have a number higher than the number shown in the Total Guest Visits row at the top, since that row – surprise! – shows the total number of households who registered for each event, and the total number of households registered across all of the specified time period.

The Req column shows the total number of each product that were requested by the households visiting for each event and across the specified time period; and since (at least for our Pantry) many of the products are individual products where more than one can and probably will be requested, the numbers in this column may often be greater than the number of total guest visits.

The Prov column shows the total number of each product that were provided to the guests for each product. In an ideal situation, of course, the numbers in the Prov column would be exactly the same as the numbers in the Req column. Sadly, it's all too common for us to run out of a product, and have to tell guests that we're unable to provide that product on that visit, so our Prov numbers frequently fall short of our Req numbers.[3]

Rather than just look at the raw numbers that told us "Gosh, we didn't have as much of these products as people needed," we'd like to know something about the magnitude of our lack – how close were we coming? Were we pretty close? or really, really far away? The final column, %, gives us a better look at that, by giving us the ratio of requested products to provided products. If the % figure is, oh, 85 or better, we're doing pretty well; if it's below, say, 35, we really need to look at our product procurement strategies.

There is a lot of valuable information in this table, especially if your area of service is, like ours, one for which statistics are not readily available. Until we

[3] This is, in fact, one of the major reasons we developed PEPbase; we needed a way to keep track of who *hadn't* gotten something, so that they'd still be eligible for it at their next visit. Necessity is the mother of invention.

started being able to look at this report, we really had no idea of the actual need for personal and household hygiene products – there weren't any statistics available. With this report, we not only know how well we're doing at supplying our guests, we can begin to report out to the field how big the need is – how many people need how much, how often, of these products.[4]

Reformatting and additional calculation possibilities

Because PEPbase is set up as an Internet-compatible program, it relies very heavily on the standard display and printing capabilities of the web browser you're using. Short of some incredibly complex and detailed work on the part of the programmer – which would probably still fail with some browsers – it really isn't possible to get an elegant presentation of an arbitrary set of data.

We therefore recommend that you do a copy-and-paste[5] to move the data in the on-screen report into whatever spreadsheet you use within your agency, and use the capabilities of that program to do whatever formatting you feel is best. This also lets you add in other analyses of the data from this table. For example, we usually add a column between the Product-Name and the first event columns, and insert a conditional formula that will insert a string (in our example, the string is !!! to alert us if the overall fulfillment percentage for a product is less than 35%.

Below is the top left-hand quadrant of the March 2009 Fulfillment Report generated from the **Print Shopping History Report** with Print for each Day detail. Since the Total Counts columns are about four pages away from the first event's details, this extra column with the conditional formula lets us see much more easily where we fell short that month. (We've also massaged the formatting a little, so that the columns fit better, and we've removed the Prod-ID column and the rows for any inactive products.)

---

[4] This still isn't a completely set of statistics; these numbers show how many products were requested in what time period *given our rules for eligibility across household composition and time*. A household can't request a product if it's not on their Shopping List, which is set by our rules; so we are almost certainly under-reporting the need, or at least the self-perceived need, for these products. Still, it's a start.

[5] I can't tell you why, but I find that I sometimes have difficulty getting the "paste" to work properly. I often seem to end up with just the top row pasted in, rather than the whole table. Since I haven't been able to identify a consistency about this misbehavior, I don't have a good solution strategy for you yet, although one thing that does seem to work fairly well is going to the bottom right-hand corner and dragging up and to the left, and *then* doing a "copy" command.

PEP Fulfillment Study
March 2009

		3/1/2009				3/5/2009				3/8/2009			
		#HH	Req	Prov	%	#HH	Req	Prov	%	#HH	Req	Prov	%
Total Guest Visits		**21**				**41**				**10**			
toilet paper		15	15	14	93	36	34	32	94	9	9	9	100
kleenex	!!!	19	19	0	0	33	30	0	0	7	7	0	0
laundry soap		15	15	14	93	33	31	11	35	9	9	0	0
dish soap		16	16	15	94	36	34	30	88	9	9	9	100
all-purpose cleaner		8	8	8	100	19	17	15	88	8	8	5	63
glass cleaner		9	9	8	89	16	14	12	86	7	7	2	29
scouring cleanser	!!!	17	17	2	12	27	24	4	17	6	6	0	0
paper towels	!!!	21	21	1	5	35	32	0	0	10	10	1	10
garbage bags		15	15	12	80	28	26	3	12	10	10	10	100
incontinence pads	!!!	0	0	0	0	0	0	0	0	0	0	0	0
hair pick	!!!	5	10	6	60	14	58	2	3	4	8	0	0
comb		12	27	26	96	18	61	30	49	5	8	9	113
brush	!!!	16	33	0	0	21	70	0	0	6	17	0	0
lip balm	!!!	14	37	28	76	23	84	0	0	7	22	2	9
dental floss	!!!	11	11	1	9	20	17	0	0	8	8	0	0
nail clipper	!!!	11	21	0	0	20	64	0	0	7	19	0	0
emery board		4	13	13	100	16	57	21	37	5	17	0	0
toothbrush (child's)		5	11	0	0	7	9	8	89	4	7	5	71
toothbrush (adult)		8	13	13	100	14	42	20	48	8	19	18	95
razor (woman's)		12	18	17	94	18	42	5	12	5	9	3	33
deodorant (woman's)		12	18	11	61	20	42	10	24	5	10	6	60
Q-tips		14	14	13	93	28	26	24	92	8	8	6	75

As you can see, we're still having trouble procuring enough kleenex, scouring cleanser, paper towels, incontinence pads, hair picks, lip balm, dental floss, and nail clippers.

The analyses you want to run will of course depend on your agency's mission and your reporting responsibilities; but at least with this report, you can easily summarize and tabulate the raw data into something that can be analyzed and examined.

Other Reports

[This area is still under development. Plans for options within **Other Reports** include reports on frequency of household visits by household, summation of household totals by ZIP code, analysis of household demographics by gender and age.]

Households

Create New Household Records

This option is not apt to be used very commonly; new household records will generally be created at the point of registration by the Host. However, if the computer goes down, or your network cable fails, or some other catastrophe happens, you may find yourself resorting to your old paper-and-pencil based forms at registration, and turning them into records after the fact.

The process of creating new Household records from the Coordinator functions is very, very similar to that used from the Host menu, *except that PEPbase will not search for duplicates* in the same fashion. Therefore, use this option *only*, repeat

only if you are absolutely sure that the Household does not yet exist within the database.

The main reason for creating new Households from the **Coordinator Options** is that you can add the name/gender/date of birth information at the same time, rather than having to go back in and find the record again, as you would if the Host had entered the new Household. Check the *Registering for returning guests* discussion in ***PEPbase in Routine Use*** for information on entering address and phone data and dealing with the allergy, incontinence, and language flags; see *Update Existing Household Records*, below, for entering individual household member data.

This function will probably be modified somewhat in the coming months, to provide added protection against the creation of duplicate Households.

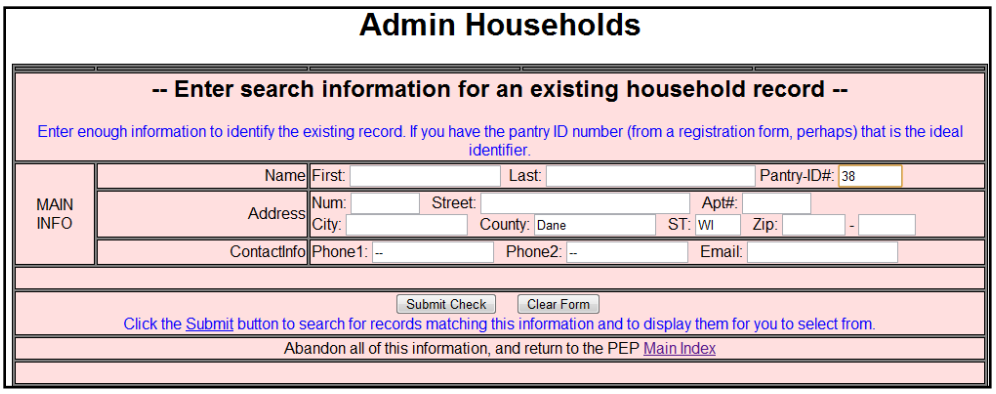
Update Existing Household Records

This is probably the most frequent duty of the Coordinator. Depending on your agency's service catchment area and population, new households may make up anywhere from 1% to 50% of your guests at each visit. And, as mentioned in the discussions in the discussion of *Registering a New Guest* in the ***PEPbase in Routine Use*** section of this manual, it's not generally feasible to collect and enter the information on the specific individuals within a new household at the time of registration. This is therefore done as part of the **Coordinator Functions**.

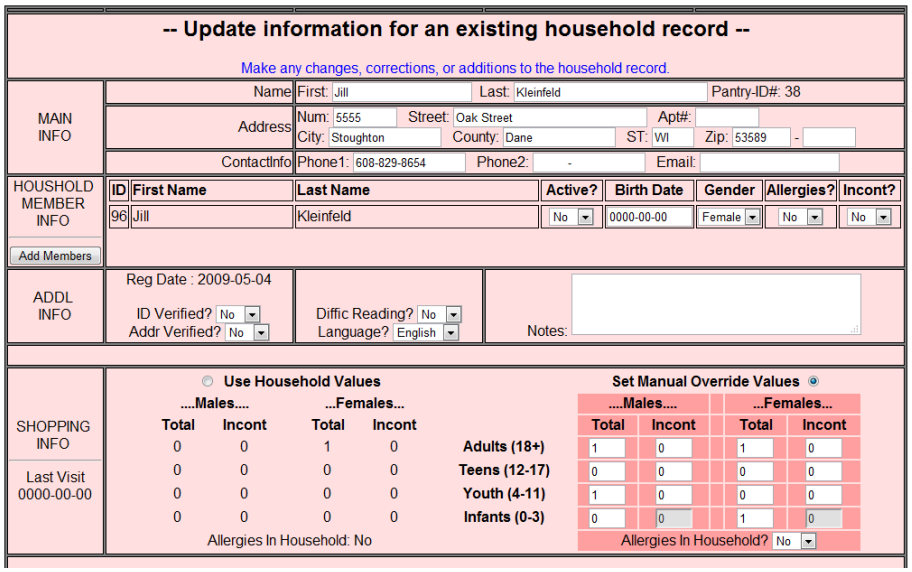
Let's set up a new guest for our database. We'll assume we got the basic information in at the time of registration, from the Host functions, and that we're now coming back to it from within this Update Existing Household.

You'll notice that the directions on the form tell us that the ideal is to work from the Pantry ID# – and this is indeed the case. While we *can* search for an existing household using name or address, the result of that search is to leave us looking at Household record with no access to the individual member information.

So, we'll look for a guest who just registered, Jill Klienfeld. We'll use her printed Cover Sheet, which gives us her Pantry ID#; she's Pantry ID#38:


Admin Households
-- Enter search information for an existing household record --
Enter enough information to identify the existing record. If you have the pantry ID number (from a registration form, perhaps) that is the ideal identifier.
MAIN INFO
Name
First:
Last:
Pantry-ID#: 38
Address
Num:
Street:
Apt#:
City:
County: Dane
ST: WI
Zip:
ContactInfo
Phone1: --
Phone2: --
Email:
Submit Check
Clear Form
Click the Submit button to search for records matching this information and to display them for you to select from.
Abandon all of this information, and return to the PEP Main Index

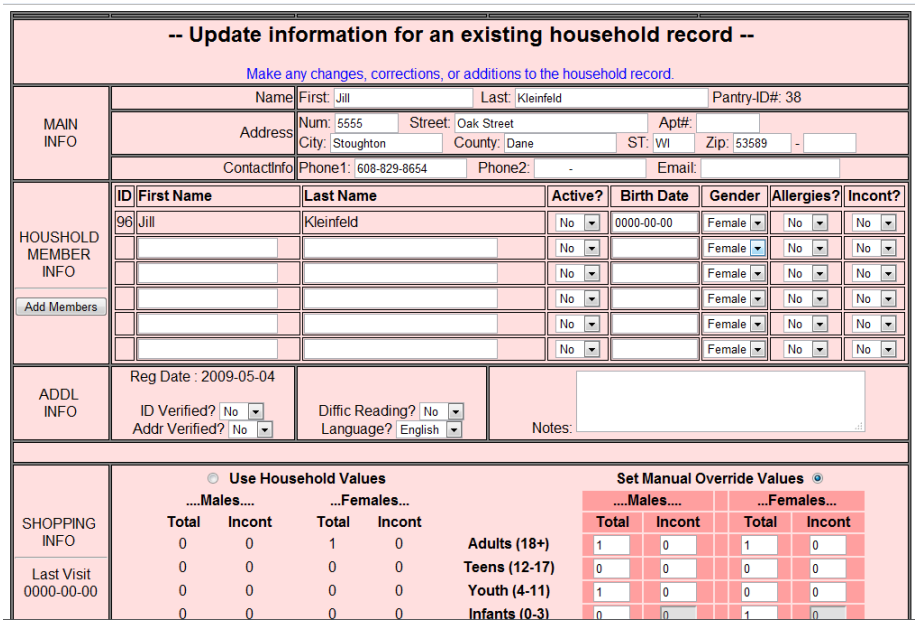
We type that in to the Pantry-ID# window, and then click on Submit Check. PEPbase retrieves her record, and displays it for us, with the information that was available to the Host at the time of registration:



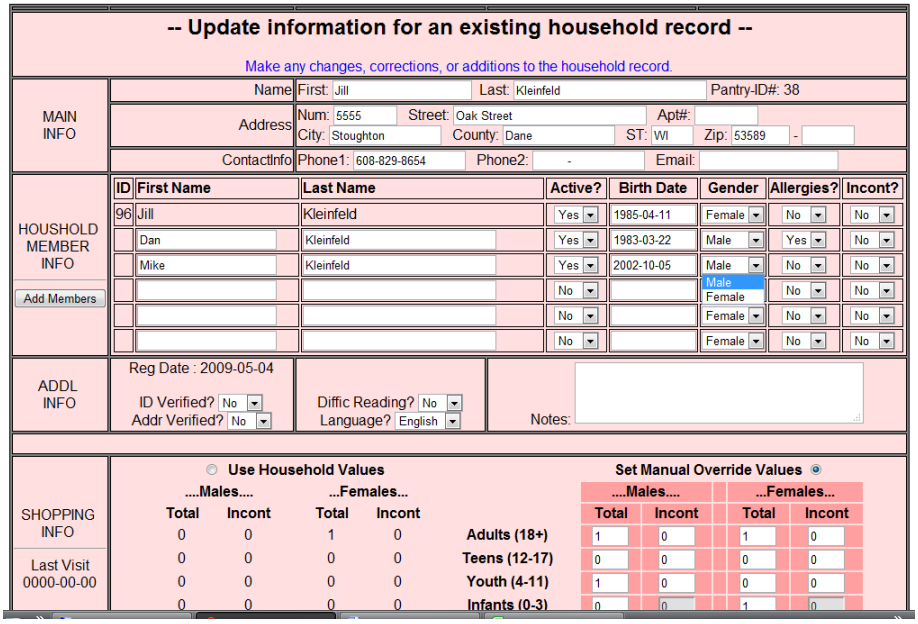
You'll notice that the Host has told us that Ms. Kleinfeld lives with one male adult, one male youth, and one female infant; we can see those counts in the **Set Manual Override Values**, which are highlighted.

However, the only member of the Household listed is Ms. Kleinfeld herself, because the Host has no way to add information for the individual members. We have to do that from here, as Coordinator.

The first thing we have to do is to get space to record more members of the household. When the Add Members button is clicked, PEPbase will generate the necessary data entry screen, providing space for six members (Ms. Kleinfeld herself, plus five additional household members):


-- Update information for an existing household record --
Make any changes, corrections, or additions to the household record.
MAIN INFO
Name First: Jill Last: Kleinfeld Pantry-ID#: 38
Address Num: 5555 Street: Oak Street Apt#:
City: Stoughton County: Dane ST: WI Zip: 53589
ContactInfo Phone1: 608-829-8654 Phone2: Email:
HOUSHOLD MEMBER INFO
Add Members
ID First Name Last Name Active? Birth Date Gender Allergies? Incont?
96 Jill Kleinfeld No 0000-00-00 Female No No
ADDL INFO
Reg Date : 2009-05-04
ID Verified? No
Addr Verified? No
Diffic Reading? No
Language? English
Notes:
SHOPPING INFO
Last Visit 0000-00-00
Use Household Values
Set Manual Override Values
....Males.... ...Females...
Total Incont Total Incont
Adults (18+) 0 0 1 0
Teens (12-17) 0 0 0 0
Youth (4-11) 0 0 0 0
Infants (0-3) 0 0 0 0

Working from the information on the Cover Sheet, we can now enter the information for each of the four members of Ms. Kleinfeld's Household:


-- Update information for an existing household record --
Make any changes, corrections, or additions to the household record.
MAIN INFO
Name First: Jill Last: Kleinfeld Pantry-ID#: 38
Address Num: 5555 Street: Oak Street Apt#:
City: Stoughton County: Dane ST: WI Zip: 53589
ContactInfo Phone1: 608-829-8654 Phone2: Email:
HOUSHOLD MEMBER INFO
Add Members
ID First Name Last Name Active? Birth Date Gender Allergies? Incont?
96 Jill Kleinfeld Yes 1985-04-11 Female No No
Dan Kleinfeld Yes 1983-03-22 Male Yes No
Mike Kleinfeld Yes 2002-10-05 Male No No
Male
Female
ADDL INFO
Reg Date : 2009-05-04
ID Verified? No
Addr Verified? No
Diffic Reading? No
Language? English
Notes:
SHOPPING INFO
Last Visit 0000-00-00
Use Household Values
Set Manual Override Values
....Males.... ...Females...
Total Incont Total Incont
Adults (18+) 0 0 1 0
Teens (12-17) 0 0 0 0
Youth (4-11) 0 0 0 0
Infants (0-3) 0 0 0 0

In this screen shot of the process, the Coordinator has already recorded the information for Jill and Dan – they're both Active, birth dates are in the correct format of YYYY-MM-DD, gender has been indicated, and the Allergies? Flag for Dan has been set to Yes. Mike has been logged as an Active member, his date of birth has been entered, and the Coordinator is in the process of setting his Gender to Male.

If Ms. Kleinfeld's family included more than six members, we could click on Add Members as many times as we needed to accommodate her family. We would get room for five additional household members with each click on the Add Members button. Any fields that were not needed would simply be left blank (as we're going to do here in a moment, since there are only four members in the Household); PEPbase would stop its record creation with only four members.[6]

The last thing that the Coordinator does on this update process is to click the radio button for **Use Household Values** to tell PEPbase to use those values when Ms. Kleinfeld visits the Pantry again. This will also highlight that section, so that the Host is aware of which values PEPbase is using.

Clicking the Save Household button will save all of this information, and return us to the search screen – **Enter search information for an existing household record** – so that we can go on and enter the next Household.

Care needs to be taken in entering this information because this information that defines so much of Ms. Kleinfeld's interactions with us – *what* products her household will be eligible for, and *how often* she'll be eligible for them. It will also determine whether her Shopping List or other forms are printed in a language she can understand, and whether she'll receive whatever assistance she might need from Pantry staff when she visits.

Setup Info

The options in this section of the **Coordinator Functions** define the way that PEPbase behaves, in terms of its product eligibility rules, its identification of potential duplicate Households, its language capability, its recognized users and their level of use, and the help information presented to its users. To the highest degree we could, we made all of these customizable by your agency, for your agency.

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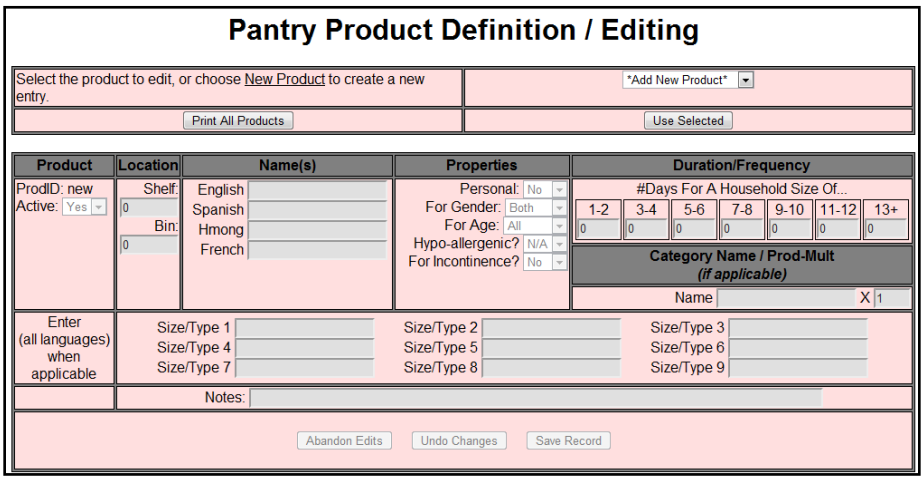
[6] You may also notice that not only does the Household have an ID number, but so does Jill – she's ID 96 in this demo dataset. Like the Pantry ID#, these are automatically set by PEPbase; however, unlike the Pantry ID#, the only way that these are used are internally by PEPbase. Neither you nor the guest needs to worry about them, deal with them, or even really know about them. If you're curious about how PEPbase uses them, check the ***Technical Specifications*** section of this manual.

Update Product Information

In many ways, this is the heart and soul of PEPbase. The definitions established for the products will determine who can receive what products, and how often they can request them. It also gives PEPbase the matrix for reporting on product consumption, by product and by household. The more specifically you define your products, the more control you have over who gets what, when, and the more complete the reports you can get. On the other hand, it's probably not particularly valuable to have a product definition for every variety of canned vegetables, or for all gazillion varieties of pasta that may come through your pantry. Your goal is to define those product classes that you need to control and report on – for us, toilet paper, kleenex, laundry soap, dish soap…. For you, it may be frozen meats, fresh meats, dried pasta, fresh fruits, canned fruits, fresh vegetables, frozen vegetables, milk, eggs….

It's worth taking some time, in other words, to think about what you're distributing, why it's distributed in the quantities it is, why it's distributed across time the way it is, and who's eligible for it.

Clicking on the **Update Product Information** will bring up the following screen:



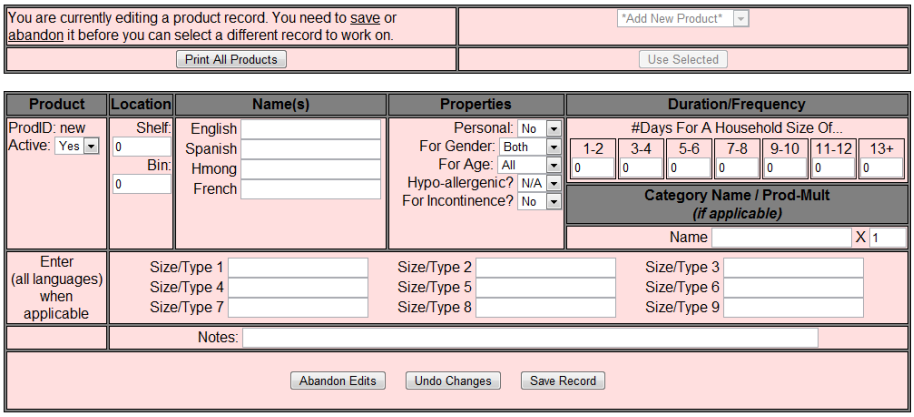
The version of PEPbase that you received has a completely and totally blank Product database; you are responsible for deciding what products to list, how you will name them, what their definitions are, and how they will be ordered on the Shopping List and on summary reports such as the Shopping History Report.

Eventually, you will be able to customize the **Properties** categories, but for right now, you are limited to the **Properties** we have set up: Personal, For Gender, For Age, Hypo-allergenic?, and For Incontinence?

For my ease in discussing this, I'm going to begin with a product that we might carry. We'll then walk through the process of defining that product, and talk about the implications of that definition for your guests.

Adding a product to the database

We're doing to add the product toilet bowl cleaner to our Product database. Since it isn't yet in there, we have to begin by telling PEPbase that we wish to Add New Product. This option is shown in the pull-down list in the upper right-hand corner of the screen: When we click on Use Selected, PEPbase brings up a new Product definition screen:



For the sake of this discussion, we'll begin at the top left, and work our way across the options available to us in this definition.

To begin with, PEPbase gives us a reminder and a warning: You are currently editing a product record. You need to save or abandon it before you can select a different record. Since there's a fair degree of complexity to this process, the program (well, the programmer and I) make you consciously decide to abandon your work before you can go off to do something else, or, of course, to save it.

We'll deal with the Print All Products button down below, after we've finished all of the other sections of this form.

Product

ProdID is assigned by PEPbase automatically, in the same fashion as all of the other ID numbers used in the program. Since we haven't yet saved this product, its ID is simply new. The ID will be assigned as soon as we click Save Record.

It is – or will be – an Active product, so that flag is correctly set to Yes. However, since there may be times when a product becomes unavailable for a while – the venison from the fall hunt is finished, or your pantry only gives out window insulation kits from October through December – this flag can be set to No. In this way, you can keep the product and its definition in the database, but have it invisible and unavailable.

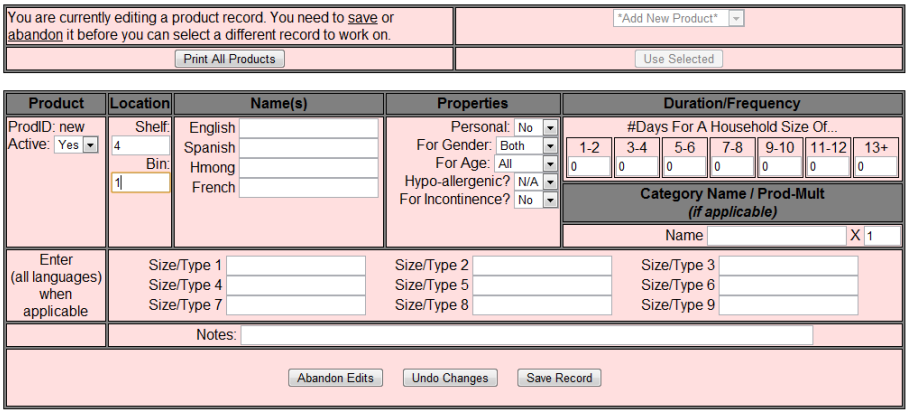
Do *not* over-write an existing but inactive product to define a new product. Since PEPbase uses the ProdID as the key identifier, any and all information that was generated about the distribution of the original product will be grouped into the information on the *new* product. There will absolutely no way of separating out the information that applied to, say, "Liver Sausage" that you defined as a product in January of 2010 from the information that applied to its replacement, "Green Beans," that you decided to create by overwriting the "Liver Sausage" information. If you aren't going to carry "Liver Sausage" any more, simply set the Active flag to No; since it will never appear on any shopping lists, it won't be cluttering up your data; and the new product, "Green Beans," that you created as an entirely new product with its own ProdID will have accurate and reliable distribution data.

Location

The Location definition is used to tell PEPbase what order to use for the products on the Shopping List. Our presumption is that, whether your guests will their own orders with your assistance or you fill the guest orders and take the completed orders out to the guests, it would make sense to take the products in their order on your pantry shelves. The Shopping List will print out in order by Shelf and then Bin, so that products on the same shelf will be printed next to each other.

In our case, our toilet bowl cleaner is going to be located in the area of household cleaning supplies; that'll put it on either Shelf 3 or Shelf 4. Since Shelf 3 is already pretty full, with four products, we'll add toilet bowl cleaner to Shelf 4,

and move the paper towels over to the right by one place. That will put toilet bowl cleaner on Shelf 4, Bin 1.



With scouring cleanser on Shelf 3, Bin 4, and paper towels on Shelf 4, Bin 2, that means that the shopping list will print out in the order of:

- Scouring cleanser
- Toilet bowl cleaner
- Paper towels[7]

This ability to define a product's location also means that if ever you need to change where you put products, it's a relatively simple thing to reassign the order as it will appear on the guest's Shopping List; you simply change the Shelf/Bin definition in the Product database.

Name(s)

You will have to provide at least one name for the product, in English. As of this writing (May 2009), the database is set up to handle a total of four languages: English (the default language), Spanish, Hmong, and French. As the Language Information function is completed, you'll be able to reset this to handle whatever languages you may need. In the meantime, you *can* provide only the English – but any household you designate as needing one of the other three languages will get a fairly strange shopping list.[8] We recommend that you do try to provide at least the Spanish and Hmong for your products (we have the French

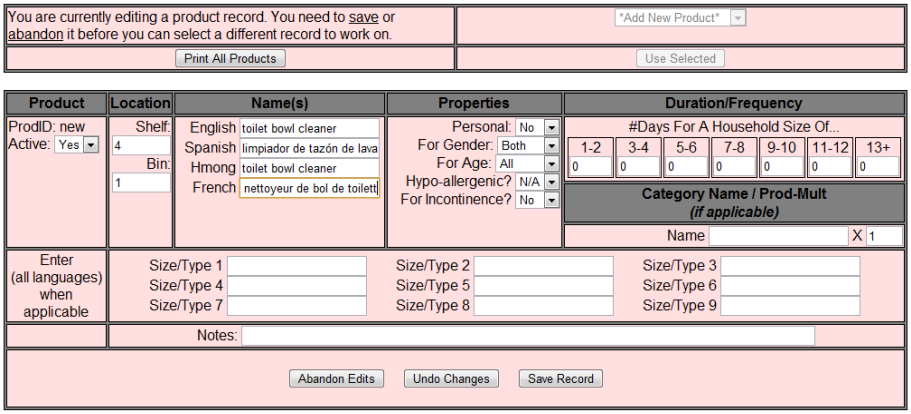
[7] Sorry not to have given these rounded rectangles; I'm working from Word, not in PEPbase, and I'd have to do those bullets as graphic characters, which can really screw up the layout.

[8] At the present time, if PEPbase is told to use a foreign language but doesn't have entries in the database for them, it will use the default language, English. We've set things to operate this way to cover cases where you just can't find a translation for the product name – as in our example of toilet bowl cleaner in Hmong, below.

because of a cluster of about 5 households from Ruanda, which used to be a French colony). If you don't have folks within your staff or guests who can help, look at some of the free on-line translation programs.[9]

For our new product, these entries would be:

English: toilet bowl cleaner
Spanish: limpiador de tazón de lavabo
Hmong: toilet bowl cleaner[10]
French: le nettoyeur de bol de toilette



Properties

As mentioned above, for right now the four *categories* of Properties are fixed. If you've got a crackerjack programmer around, you can certainly talk about changing them (although this process goes beyond just changing the labels here; you'd want to take a look at the logic of how they're used, and do a lot of code searching; see the ***Technical Specifications*** section). However, even for food pantries, you may find that these are useful categories for the products you carry.

Personal is a yes/no flag that determines whether this product is allotted one standard quantity[11] per household, or one standard quantity per individual. If

[9] We've been going to http://www.freetranslation.com/, which seems to do a pretty good job for Spanish and French. It's a little tedious, because you can't do your whole document at one time but rather have to do words and phrases, and they miss some colloquialisms, but for the type of stuff we need, it seems to do fairly well. For Hmong, on the other hand, we end up doing a lot of searching – remember that Hmong only became a written language about 40 years ago, so resources are much sparser.

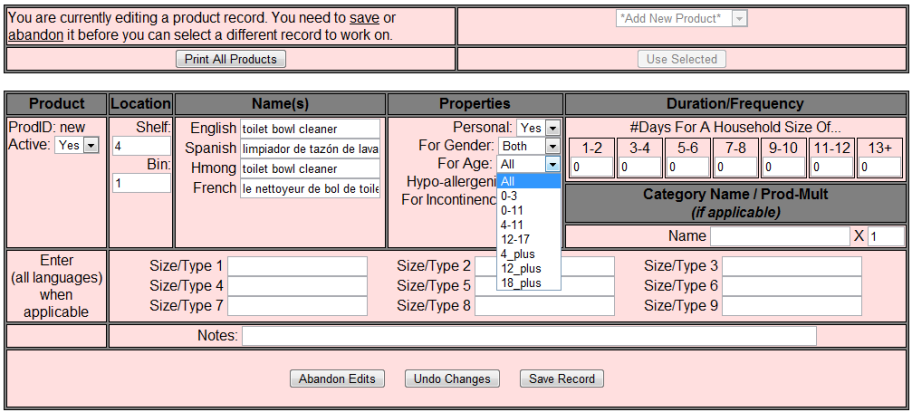
[10] Like we just said: Resources for Hmong are much sparser; a search for this term turned up nothing.

[11] "Standard quantity" doesn't get defined anywhere in the database, really; whatever that "standard quantity" is *can* be set up to print as a comment after the product name on the Shopping List (toilet paper *[2 rolls]*), but PEPbase only worries about whether it's distributing *one* unit of standard quantity,

you're a food pantry, most of your products will probably be set to no; but if you're dealing with personal hygiene essentials, a lot of them will be yes. Let's face it; toothbrushes just shouldn't be shared.

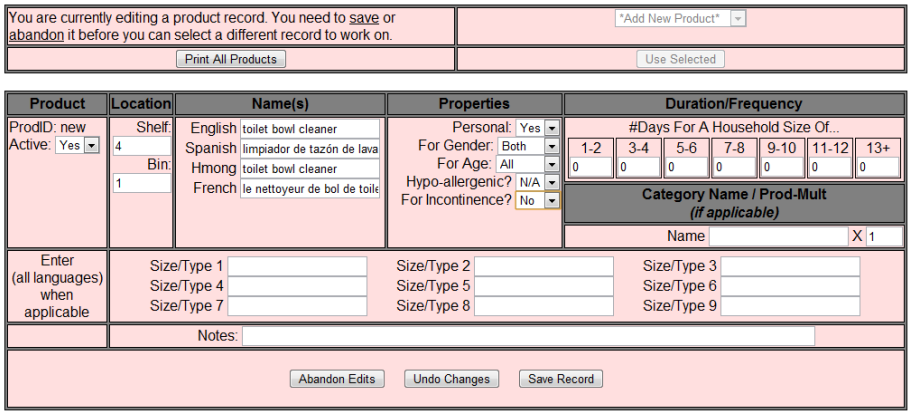
For our example new product, toilet bowl cleaner, this flag will of course be set to no; toilet bowl cleaner doesn't (or *shouldn't!*) come in contact with the skin, and therefore will not be contaminated by that contact.

For gender is a three item list: Male, Female, Both; as expected, we've set this flag to Both. Products that are specifically for use by males (men's deodorant, or, if you're incredibly gifted with space and money for diapers and pull-ups, boy's pull-ups) or specifically for females (sanitary napkins, tampons, women's deodorant, or, again if you're incredibly gifted with space and money, girl's pull-ups) are flagged appropriately. If a product is marked as Personal=No, this flag will almost certainly set to Both, as it is here for our example.



For age allows you to specify a product as being restricted to individuals 0-3 (infants), 0-11 (infants and youth), 4-11 (youth), 12-17 (teens), 4_plus (youth and teens), 12_plus (teens and adults), or 18_plus (adults). As with the For Gender flag, any products that are flagged as Personal=No will almost certainly be set to For Age=All, as it is here for our example product.

in which case it uses the rounded rectangle for the checkmark space, or *variable* units of standard quantity, in which case it uses the line as the checkmark space on the Shopping List.



However, diapers and pull-ups, which are, of course Personal=Yes, are restricted for distribution to children ages 0-3 at our Pantry[12]. Infant formula could actually be marked as Personal=No (if the family has an infant, they get infant formula) or Personal=Yes (if the family has infants, they get one bottle or box of formula per child), but would probably still be set at For Age=0-3.

Personal products (Personal=Yes) that are delimited by age will be distributed on the basis of product_quantity=count_of_eligible_individuals. General products (Personal=No) will be distributed in the defined standard quantity to any household with a member of that specified age.

Hypo-allergenic? is another three-condition flag. It can be set to Yes, No, or N/A. If the flag is set to Yes, it will be distributed *only* to households where at least one member has an allergy. If the flag is set to No, it will *never* be offered to any household (if it's a general product) with an allergy, or offered to any individual (if it's a personal product) with an allergy. If the flag is set to N/A, the product presents no danger to folks *with* allergies, so can be offered freely.

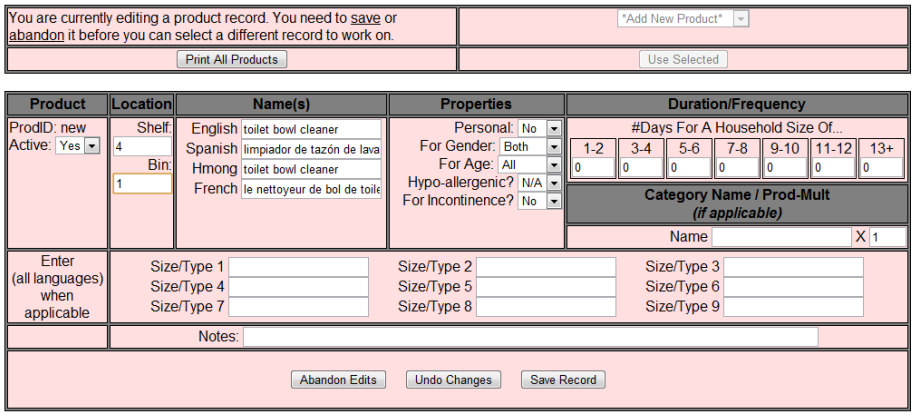
Our allergy concerns at the Personal Essentials Pantry are chiefly fragrances. If you're in a food pantry, however, you also may find this flag useful. You won't be able to set it for specific allergens such as wheat, soy, eggs, or peanuts, but you can set it as a cluster for anyone with an allergy to *any* of these.

It is possible that our example product, toilet bowl cleaner, had so many fragrances that it might be unusable by people with allergies. Most brands,

[12] Well, that's actually not quite true; they're restricted to *either* [Households with Infant_Count>0] *or* [Households with Individual_Incontinence=Yes; see the discussion on the For Incontinence flag below.)

however, are sufficiently focused on *cleaning*, and get rinsed away so thoroughly, that this isn't a major factor, so we've left this flag set at N/A.

The For Incontinence flag is a yes-no flag; either the product is needed by people with incontinence, or it is not. In this case, we can set the flag to No.

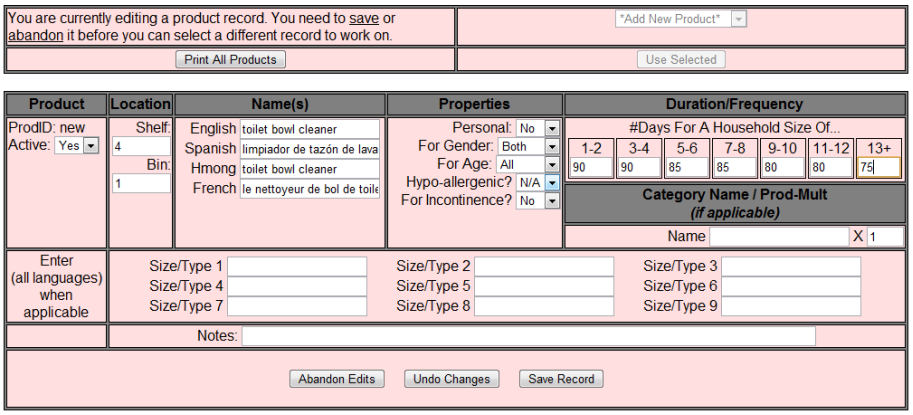


Duration/Frequency

This controls how often the product will be offered to the guests. As we've mentioned repeatedly, our area of personal and household hygiene products is notable for the widely variable life span of our products. If you're a food pantry, this may not be quite so much a factor for you, but you still may find it useful.

Generally speaking – universally, in our experience – products that are Personal=Yes will have the same product duration regardless of household size. Since only one person is using the product, the fact that there are other members in the household should not affect the product's use – a toothbrush will still last me six months, whether I have one other member in my household, or six others.

However, the duration for products that are *not* personal will vary depending on household size. As we've set things up, you can define a different duration for every additional two people in the household. For some of our products, there will be a marked difference in the duration across household size; for others, increased size makes less difference. Our example product, toilet bowl cleaner, will probably not be as affected by household size as, say, shampoo; more people does mean more use of the toilet, but it won't be as drastic as the inroads that more people make on the bottle of shampoo. We'll set it up, therefore, with fairly minimal difference:



You'll notice that not only have we made it a fairly small variation, we've kept it the same across pairs of groups, so that a household has to increase by four before the duration changes.

Category Name / Prod-Mult

> [This area is still under development. It is intended to let you group similar products under a single heading, and provide a common set of product properties and duration/frequency for all of the products. In our Pantry, for instance, all menstrual protection products are grouped as a single category, and diapers/pull-ups are similar grouped. The effect is to let our guests select from all of the products within the category, but to limit the total number of products within the overall category that they may request.]

Size/Type

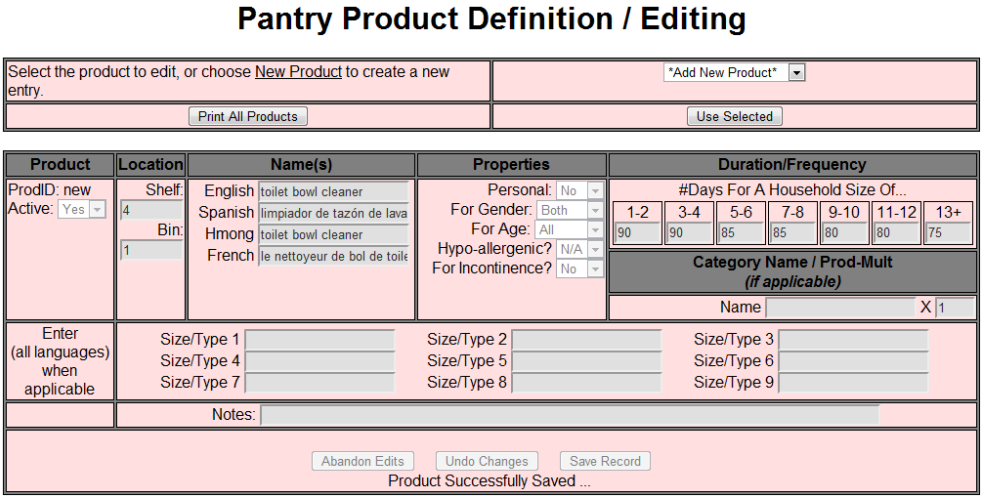
This dimension of the product definition lets us define sizes or types within the product that we might carry on. Diapers, for instance, come in a multitude of sizes; menstrual protection comes in a range of absorbencies. If you're a food pantry, you might have potatoes available in 1-pound, 5-pound, and 10-pound bags. In this instance, we're dealing with just a can of toilet bowl cleaner; we might have slightly different sizes coming in from different suppliers, and we probably will have different brands at different times, but we're not going to try to specify those. We're just distributing a can of toilet bowl cleaner to households who request the product, so we leave this area completely blank.

Notes

A relatively limited space is made available for any notes or comments you may need to make about the product; "Inactive May through September," for instance, or "Christmas holidays only," or "Must be ordered through XYZ company." This doesn't provide you, and isn't intended to provide you, with an exhaustive description of the provenance and care requirements, but just to let you make a brief reminder note.

Saving the Product definition

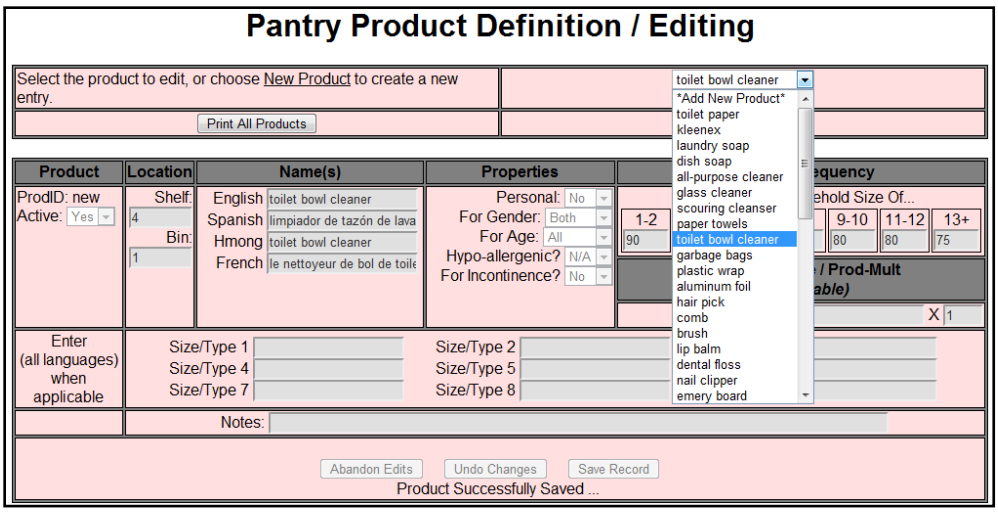
Our final step, after giving a quick scan over the record to make sure we got everything complete, is to click on the **Save Record** button at the bottom of the screen. Once that's clicked, PEPbase will assign a ProdID number and create the record for the product:



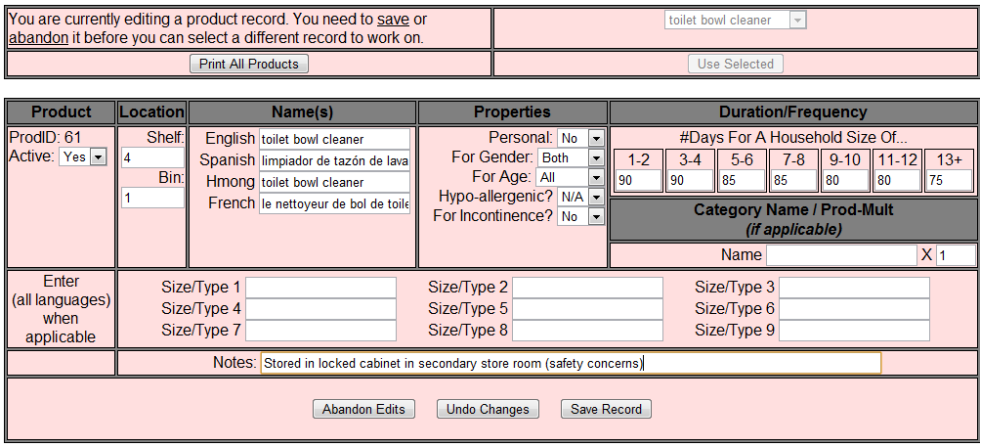
Although you won't see the newly assigned ProdID, the fields on the screen have been grayed out, indicating that we're *looking* at a product, but not *editing* a product. If we needed to make a change to what we just saved, we've have to go back and select it again from the box at the top right.

Modifying a product definition

Since we do need to walk you through this process, let's just assume that, as we looked at this saved record, we realized we should have made a note that, because of safety concerns, it's stored in a locked cabinet, not in our usual store room. We need to find it and highlight it in the list (and you'll notice that PEPbase has placed it in its proper order by Shelf/Bin within the list, not at the end):



Once we click on Use Selected, the record will be active again, and we can add our note:



If we had noticed anything else that needed modification, we could have changed it at the same time.

In the same way, if we decide that the rules for a product need to be modified, or the product needs to be made inactive, or we find that our translation for a given language was misleading (or we *find* the translation for "toilet bowl cleaner" in Hmong), we could select the product, click on Use Selected, make the necessary changes, and then Save Record. The changes are effective immediately; if you discover in mid-shift that a product has been misdefined (Oops! Diapers are N/A for Hypo-allergenic, not "No"), you can go in as Coordinator, make the change, and the product will be redefined for the next guest who registers.

Deleting products

We've mentioned this a couple of times already, but it's worth repeating:

Do not delete a product!
Do not over-write a product to change it into a difference product!

Simply make it inactive. Because PEPbase identifies products by their ProdID, redefining a product to change its name and definition means that you now have two different products (quite possible *very* different products) identified as the same product as far as PEPbase is concerned. Marking the product as Active=No will accomplish what you need – taking the product off the shopping lists, and omitting it from any summary reports – without any unintended and adverse consequences.

Update Shelter Information

[This feature is still under development. When finished, this will let you create a database of known shelters in your area, with not only their address and phone information, but information on maximum length of stay. Since many shelters work on a "length of stay" definition that is the *total* number of days/nights, rather than the *cumulative* number of days/nights, this does not force a new address when the maximum defined length of stay for a shelter has been exceed; rather, it simply alerts the Host that a Guest may have exceeded the allowable stay, and prompts the Host to check on whether the Guest has moved, and if so, to get the new address.]

Update Language Information

[This feature is still under development. When completed, it will let you define the dataspace for the languages that your agency will support, and to enter the text for policy blocks such as those on the Cover Sheet. As of the time of this writing, PEPbase already has dataspace assigned for Spanish, Hmong, and French in addition to English. These languages are therefore included in the language options within the Product Definition capability.]

Update Host/Coordinator Information

[This feature is still under development. When completed, it will allow the administrator to set up log-in identities and allowable access levels for staff, and to define passwords for the various levels of access.]

Database Settings/Helpfiles

[This area is still under development. When completed, it will allow the administrator to customize the help messages – the text shown in blue – that is presented on each screen.]

Miscellaneous

Database Maintenance/Error-Checking

[This area is still under development. When completed, this will consist of a set of routines to check for potential duplicate Household records, duplicate Product Definition records, and other data entry errors.]

Return to Host Menu

Clicking on this link will simply log you out of the **Coordinator Functions** and return you to the **Host Menu**. It should be your last step on any Coordinator work.